Bioterrorism Readiness Suite™ 3.0
Alerting Level User Guide

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1 Introduction

Welcome to the BTRS 3.0 Alerting Level User Guide!

This chapter provides you with information about:

- BTRS, including what's new for this version
- How this guide has been put together
- Using this guide and the BTRS portal

What Is Bioterrorism Readiness Suite?

Bioterrorism Readiness Suite™ (BTRS) serves as a single, central point of log-on and access for finding, creating, and sharing information through a browser-based interface. If you have access to the Internet, you can access BTRS' portal content and collaboration areas, links to resources and applications, alerts, notification functions, and the role-based directory. Like any Web site, you simply click on buttons and links to access content and perform functions.

BTRS enables you to:

- Receive alerts from other users within your health area network (HAN)
- Locate contact information for other users within your HAN
- Read your HAN's latest news and announcements

What's New in This Version?

BTRS 3.0 includes the following additional features and improvements over BTRS 2.3a:

- *Single confirmation from any location* —When you confirm an alert via your phone, e-mail, or the BTRS portal, BTRS automatically stops all further attempts to contact you

About This Guide

To make the learning process more efficient for you, information in this guide is presented in a format different from previous versions of BTRS. The organization of the book helps you easily gain access to what you need, and then move on with your job. In addition, this guide focuses only on those functions users with Alerting level licenses perform.

How This Book Has Changed

We realize that you are under a lot of pressure to learn and use BTRS right away. You may even have another process or program in place, so this book needs to be a valuable resource for you.

To make this book useful for you, we made the following changes:

- Organize the information in the guide by the type of task you might perform, rather than by where it is located in the portal

- Keep procedures short and focused so that you can easily remember them, and later build on them

- Make tasks easy to find through a detailed index, glossary, and easy-to-find headings

- Move the technical information and setup processes into a different book

Deciding Which Book To Use

We decided that the best way to organize and format the documentation was to divide the information into three books— an *Alerting Level User Guide*, a *User Guide*, and an *Administrator Guide*. While all books provide step-by-step instructions, the focus of each is directed at accomplishing different types of tasks.

The *Alerting Level User Guide* provides information about daily BTRS use for alerting-level users, including receiving alerts and accessing news and announcements.

The *User Guide* is aimed at the day-to-day user operations working through the BTRS portal to collaborate on and post documents, and to send and receive alerts. The *User Guide* contains an overview of BTRS, provides descriptions of its functionality, and shows you how to accomplish specific tasks.

The *Administrator Guide* focuses on more advanced and technical operations, including:

- Setting up user accounts and permissions

- Managing portal content, folders, documents, and discussions

- Generating reports

Standards and Conventions Used in This Guide

This guide uses several conventions to help make accessing information easy and efficient. These conventions include:

- Standard user-friendly terminology
- Step-by-step instructions for completing processes
- Notes, tips, and cautions for using the BTRS portal
- A glossary of terms and an index for easy information lookup

Standard Terminology

This section describes both the technical and common terms used in this guide. Wherever possible, we have attempted to use familiar language that accurately reflects the functions it represents.

Microsoft® Technology Terminology

The BTRS system shares many terms with the product Microsoft® SharePoint Portal Server, as the SharePoint® product has been used to create the portal environment in which you'll be working. Although these terms may be unfamiliar to you, they represent elements of Internet browsers and windows that you likely already recognize. In addition to the following terms, please see the Glossary for additional definitions.

The following table "translates" some of the more technical terms into everyday language:

Microsoft® or technical term	Definition	What this means in BTRS
Dashboard	A page on a dashboard site. Each dashboard contains a collection of Web parts in a modular view that can be presented to users in a Web browser. Microsoft developed the term "Digital Dashboard" to reflect different areas and components of the page, similar to that of a car's dashboard.	This term is used to represent two things: • The menu of choices you can select from on the Web page to access another area of the portal. Physically, this bar appears near the top of each page in the BTRS portal. This guide also refers to the "dashboard" as the "BTRS navigation bar." • The page of the portal you are viewing or accessing, such as the *Document Library* or *Directory* dashboard. This guide also refers to this definition as "page" or "Web page."

Microsoft® or technical term	Definition	What this means in BTRS
Dashboard site	A Web site created by using Digital Dashboard technology. The dashboard site contains a number of pages, or dashboards, and includes customization pages and custom Web part forms. The dashboard site is used to distribute information to workspace users through a Web browser.	The entire Web site or portal. This guide also refers to "dashboard site" as "portal."
Portal	A Web site considered as an entry point to other Web sites, often by being or providing access to a search engine.	Rather than representing an entry point, the entire Web site, or all the dashboards put together. The BTRS portal provides you with access to other users' contact information, important documents and news, and alerts. This guide uses "portal" as the primary term to define how BTRS functions.
Web Part	A customizable, reusable component used to display specific information on a dashboard. Web parts are used to associate Web-based content (such as XML, HTML, and scripting) with a specific set of properties in an organizational framework.	A section of a Web page containing information organized by function or type, such the Announcements section on the home page, or document folders. This guide also refers to "Web part" as "section" or "area."
Workspace	An organized collection of documents, content sources, management folders, categories, document profiles, subscriptions, and discussions. It provides a central location to organize, manage, and publish content.	The entire Web site or portal. This guide also refers to "workspace" as "portal."

Common Actions Terminology

This guide uses common terms for actions and maneuvers you might perform while using BTRS. If you are new to using Microsoft® Windows® or a mouse, these terms may seem unfamiliar to you, but as you become more familiar with the Microsoft® Windows® environment, you can quickly become a skilled user.

The following table provides instructions on how to perform the most common actions.

Term	Action
Click	Point to the item you want, and then quickly press and release the left mouse button.
Expand	In the tree view, click the + (plus sign) next to the item.
Open	Point to the item you want, and then quickly press and release the left mouse button twice (also referred to as "double-click").
Point	Move the mouse until the mouse pointer is positioned over (pointing to) the item you want (also referred to as "roll over").
Right-click	Point to the item you want, and then quickly press and release the right mouse button.
Scroll	Click the scroll box in the vertical or horizontal scroll bar and drag the drag the scroll box to see different portions of the screen that are not currently visible. Scrolling only changes what is displayed.
Select	Click the item you want. A selected item usually appears in a different color or with a frame around it to indicate that it is selected. To select multiple items, press **CTRL** or **SHIFT** while you click. To deselect one or more items, press **CTRL** or **SHIFT** and click the item again.

Step-by Step Instructions

Each time you need to complete an operation using BTRS, we provide easy-to-follow instructions to walk you through your task. Each set of instructions has a step title that describes what the task can help you do. The steps needed to perform the task are numbered in sequence.

The following table describes the different formatting conventions you might encounter when you follow the step-by-step instructions in this book.

Formatting Convention	Description
Triangular bullet	Identifies a step-by-step instruction to complete a task. The step title occurs after the triangular bullet and the steps are listed in sequence below the step title.
SMALL CAPS	Identifies a keyboard action. Keys can be used alone, in combinations, or in sequences. For example, **CTRL ✛ P** means to hold down the **CTRL** key while pressing **P**.
ALL CAPS	Identifies a particular URL or path name.
Bold type	Identifies the name of a BTRS button, field, list, or menu item in a step-by-step instruction.
Italics type	Identifies the name of a window, screen, dialog box, or form.
`Courier` type	Identifies specific text for you to type in a field or on a screen.

Note, Tip, and Caution Boxes

Throughout this guide you'll find information in special boxes called Note, Tip, and Caution. Margin icons are displayed next to this information that can help make you a smarter and more effective BTRS user.

Note - This information adds to or further explains a topic, to help you become more familiar with how BTRS works.

Tip - These are hints and shortcuts that can help increase your productivity as a BTRS user.

| | **Caution** - We tell you the dos and don'ts of working with BTRS to help you avoid damaging files or losing data. Often this information is essential to the completion of the task on which you are working. |

Understanding Page Elements in the BTRS Portal

The BTRS system has been designed for easy navigation throughout the portal. While each page in the BTRS portal contains specific information and instructions, the layout of the page remains constant so that you may become familiar with the portal in a short period of time.

This section identifies some of the elements you'll see throughout the portal, and how each functions.

Elements of the Home Page

Using this example of the BTRS portal home page, look for the following standard elements:

Number	Description
1	The browser window's Menu bar and Standard Buttons toolbar (you may choose to view any or all of Internet Explorer's toolbars). Use these menus and buttons to print pages, open and close windows, and move back and forth between Web pages.
2	The browser window's Address bar. You can type the URL of your portal here, or view a list of recently-visited pages.
3	The BTRS portal title bar. This area may display your HAN's custom logo or other graphics, and displays the name of the page you are currently viewing.
4	The BTRS navigation bar. You can click these links to visit other areas of the portal. The area you are currently viewing is displayed on the navigation bar in a different.

In addition, the following graphics appear on many BTRS pages:

Graphic	Description
?	Click this graphic to display online help files for this page.
↻	Click this graphic to refresh the information displayed on the page.

2 Getting Started

Using the BTRS system is as easy as accessing the Internet. The BTRS portal is like any other Web site; once you access it, you can easily move about to view news, announcements, and alerts posted for your organization's use.

Before you get started using BTRS, take a moment to learn more about how BTRS security is set up. The BTRS system is used by many types of users, including those who create and manage user accounts, those who post and collaborate on documents, and those who use BTRS only to receive alerts. Each set of users may have different levels of access within the portal.

When you're ready, log in to BTRS, and begin your adventures in the BTRS portal on the home page, which serves as the central area and starting point for many of the step-by-step instructions in this guide.

If you get stuck and cannot find the answer to a question either in this guide, or in the online help files, contact your organization's BTRS administrator.

Understanding Types of Users and Roles

The BTRS system uses a combination of permissions to create a secure environment within the portal. These permissions are assigned through different types of user licenses and application rights, which may vary from user to user.

If you are unsure what license and permissions you have been assigned, check with your BTRS administrator.

Types of User Licenses

Each BTRS user is assigned a particular type of user license when his or her account is created. Your BTRS administrator determines which license you receive – either BTRS Administration, BTRS Collaboration, or Alerting level.

The following table shows the kinds of functions you can perform with each license:

What you can do	BTRS Administration	BTRS Collaboration	Alerting Level
Update your user profile	X	X	X
Update another user's profile	X		
Receive alerts	X	X	X
Send alerts	X	X	
Cancel alerts	X	X	
Read information and documents posted on the home page	X	X	
Use document collaboration tools (discuss, check-in/out or publish, and fax documents)	X	X	
View the role-based directory	X	X	X
Manage users, roles, role groups, and folders	X		

Roles, Role Groups, and Organizational Units

In BTRS, each user is assigned to one or more roles, and these roles may be assigned to one or more role groups and Organizational Units (OU). This enables you to quickly receive alerts by the function(s) you perform, saving valuable time in emergencies. In addition, security and permissions in BTRS are often assigned to roles or role groups, rather than to individual users, for easy organization and maintenance.

The following table briefly describes what roles, role groups, and OUs are, and how they function in BTRS.

This group	Denotes this
User	An individual user in BTRS (e.g., Peg Simpson)
Role	The function that one or more users perform (e.g. Peg Simpson and Jack Underhill both are assigned to the role Springfield Public Health Officers)

This group	Denotes this
Organizational Unit	A way to organize one or more roles that fall under a single jurisdiction, or that work as a team (e.g., Epidemiologists, HAN Coordinators, and Emergency Services Coordinators who all work for Hudson County) For organizational purposes, this unit is often created to group roles working for the same organization or in the same area
Role Group	Several roles that can be assigned or collected into a single group (e.g., All workers in all roles in the city of Springfield, or all California HAN Coordinators) For alerting and security purposes, this unit is created to group roles in similar job functions

Types of User Permissions

In addition to user licenses, BTRS administrators can also assign various security permission levels to each user account. These permissions can be assigned either to your role or role group, or to a particular folder in the Document Library. Therefore, when you use the BTRS portal, you may be able to see and access areas and items that other users cannot, and vice versa.

Role-based Permissions

Permissions assigned to your role can include the ability to:

- Receive alerts from other users

- Belong to one or more role groups

To help maintain a secure environment within the BTRS portal, most users do not work with role-based permissions; instead, these rights are generally handled by BTRS administrators.

Logging on to the BTRS Portal

To access the BTRS software, you must log on to a secure portal. You will need the following information from your BTRS administrator before you begin:

- Your user name and password you will use to log on

- The Web address (URL) of your BTRS portal

The first time you log on to the BTRS portal, you need to complete your profile information. For more information, see "Logging on for the First Time" in Chapter 3, page 15.
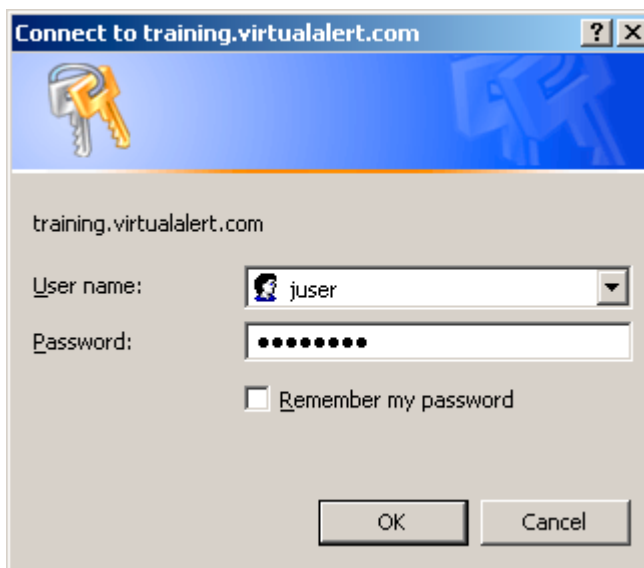
▸   **To log on to the BTRS portal**

1   Open Microsoft® Internet Explorer.

2   In the **Address** bar, type the Web address of your BTRS portal.

| Address | http://training.virtualalert.com/btrs/ | |
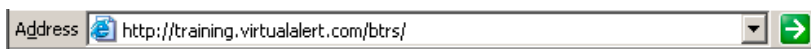
3   Press **ENTER** or click .

The *Connect to* dialog box opens.

If you are using Microsoft® Windows 2000, the *Enter Network Password* dialog box opens.

Connect to training.virtualalert.com

training.virtualalert.com

User name: juser

Password: ••••••••

☐ Remember my password

OK   Cancel

4   In the **User Name** field, type the user name provided by your BTRS administrator.

Your user name is case sensitive. Make sure it appears in the field exactly as it was given to you.

You may change your password after successfully logging in for the first time. For more information, see "Changing Your Password" in Chapter 3, page 26.

5   In the **Password** field, type your password.

Your password is case sensitive. Make sure it appears in the field exactly as it was given to you.

If you forget your password, contact your BTRS administrator. If the **Network** field appears in the *Connect to* dialog box, contact your BTRS administrator before continuing.

Be sure **not** to select the **Remember my password** check box, as doing enables others to log on to the portal without proper permission.

6   Click **OK**.

The *Connect to* dialog box closes and the BTRS portal appears in your browser window.

Logging off of the BTRS Portal

When you are done accessing information through the BTRS portal, you may log off and close your browser window.

▸ **To log off of the BTRS portal**

1   On the BTRS navigation bar, click **Logoff**.

BTRS displays a message reminding you to close your browser window to complete the log off process.

2   Click **Logoff**.

Microsoft® Internet Explorer displays the message, "The Web page you are viewing is trying to close the window. Do you want to close this window?"

3   Click **Yes**.

The browser window closes.

Navigating through the BTRS Portal

One of the first steps toward becoming an experienced BTRS user is learning how to navigate through the BTRS portal. Several pages in the portal contain standard elements to help you become familiar with the format and layout of the pages, including the BTRS navigation bar and help functions. In addition, you can move between pages within the portal to return to a previous view easily using one of several methods.

Using the Navigation Bar

The BTRS navigation bar is the primary feature that enables you to quickly access all areas of the portal. On each page of the portal, the navigation bar provides links to other pages and sections.

BTRS navigation bar

The area of the BTRS portal that you are currently viewing appears on the navigation bar in a different color. Clicking any of the navigation bar links takes you directly to that section's main page.

Using Help

On each page of the BTRS portal, you can access context-sensitive help that pertains to the topic you are working on. For example, if you click the **Help** link on the My Profile screen, the help text "Using My Profile" opens.

Elements of the Home Page

The BTRS home page contains several elements that provide you with a quick overview of current alerts, news, and events within your organization. These areas include:

- Active Alerts

- News

- Announcements

Because your BTRS portal can be customized so that it represents the needs of your organization, your portal pages might appear differently than those of another user, and from those included in this guide.

Active Alerts

The Active Alerts section of the BTRS home page displays all active alerts sent to you, even if you have confirmed the alert. Once the alert expires, the alert no longer appears on the page, even if you have not confirmed the alert.

▼ Alert Time	Sent From	Subject	Priority
8/24/2004 1:43:23 PM	Chris Edwards	Investigation Results	Medium

Active alert on the BTRS home page

To sort active alerts, click any column title. Clicking the date and time link for an active alert displays the alert's details, including time sent, the alert sender's name, the alert message text, and the alert's expiration time. For more information about receiving alerts, see "Using the Alerting System" on page 29.

News

The News section of the BTRS home page displays documents posted to your BTRS portal that reflect your organization's current news. These items are posted and managed by users with rights to publish BTRS home page content.

Clicking any of the News links displays the contents of the document, or takes you to a designated Web page.

Announcements

The Announcements section of the BTRS home page displays documents posted to your BTRS portal that reflect your organization's current announcements, in the order they were posted. These items are posted and managed by users with rights to publish BTRS home page content.

Clicking any of the Announcements links displays the contents of the document, or takes you to a designated Web page.

3 Creating and Managing Your Profile

As a BTRS user, you need to create a profile that contains information about you, where you work, what type of work you perform, and how you want to be contacted in the case an alert is sent to you. In addition, you can set and update passwords and codes to log on to BTRS and to confirm alerts as part of your individual profile.

Keeping the information in your profile up-to-date is critical to the success of the BTRS alerting system. As phone numbers, e-mail addresses, and job locations often change, BTRS prompts you periodically to verify your information.

When your system or BTRS administrator initially creates your account, he or she may provide some or all of your profile information. When you log on for the first time, you need to confirm and/or complete the information in your profile so that other BTRS users in your HAN can contact you and send you alerts.

Logging on for the First Time

The first time you log onto the portal, you must verify and complete the information in your profile before continuing.

You will need to do the following to complete your profile:

You can also change your password (see "Changing Your Password" on page 26) after you complete your profile.

- Verify and/or enter your profile information – see "Maintaining Your Profile Information" on page 16

- Enter an alerting security code – "Using Alerting Security Codes" on page 20

- Create an alerting profile – "Using Alerting Profiles" on page 22

Screens for each of these profile elements appear in your browser successively to assist you in entering all the information.

Maintaining Your Profile Information

Your profile is one of the most important elements of BTRS. Use the *My Profile* pages to enter information about you, including your background, and your work and home contact information. When you enter information in your profile, you can receive alerts from others in your alerting network. In addition, information you enter on this screen appears in the *My Directory* page so that others in your network with permissions can view your profile information to contact you.

When you complete and save your profile information, either for the first time or when you make changes, BTRS sends you an e-mail (to the e-mail address you specify) to confirm your changes.

Creating Your Profile

When you log on to BTRS for the first time or after not modifying your profile for 30 days, the *Profile Confirmation Required* screen appears. Enter information on this screen to complete or update your profile.

▶ **To create your profile**

1   Log on to the BTRS portal using the steps in "Logging on to the BTRS Portal" in Chapter 2, page 11.

After you successfully log on, the *Profile Confirmation Required* screen appears.

Make sure you complete the information in the required fields, or you will receive an error message indicating which information needs to be completed. Missing or incorrectly formatted information is highlighted in yellow on the *Profile Confirmation Required* screen to assist you in locating errors.

2   Enter the following personal information:

In this field or list	Do this
Prefix	Select **Dr.**, **Mr.**, **Ms.**, or **Mrs.**
First Name	Type your first name *This is a required field*
Last Name	Type your last name
Main Business Category	Select the type of industry that you work in
Professional Licenses	Select one or more professional licenses that you hold *Press* **CTRL** *while clicking to select more than one type*
Specialties	Select one or more medical specialties you practice *Press* **CTRL** *while clicking to select more than one type*
Organization	Type the name of your organization
Title	Type your professional title
Degrees	Type any degrees that you hold

3   Enter the following Work Contact information:

In this field or list	Do this
Work Location	Type information about where you work, such as Building 1045, Intensive Care Wing, or Sacramento
Work Address	Type the address of the facility you work in
Work City	Type the name of the city in which your facility is located
Work State/Province	Select the state or province in which your facility is located
Work Zip/Postal Code	Type the ZIP or Postal code for the facility in which you work *You must enter 5-10 characters*

In this field or list	Do this
Work Email	Type an active work e-mail address *This is a required field* Enter the complete address; for example: `joe_user@ca.gov` or `fred.smith@hospital.org`
Work Phone	Type your work phone number, including area code and any extension *You must enter at least 10 digits*
Work Fax	Type your work fax number, including area code *You must enter 10 digits*

4   Enter the following Home Contact information:

In this field or list	Do this
Home Address	Type your home address
Home City	Type the name of the city in which you live
Home State/Province	Select the state or province in which you live
Home Zip/Postal Code	Type the ZIP or Postal code for the city in which you live *You must enter 5-10 characters*
Home Phone	Type your home phone number, including area code *You must enter at least 10 digits*

5   Enter the following Alternate Contact information:

In this field or list	Do this
Alternate Email	Type an e-mail address other than your work e-mail address Enter the complete address; for example: `joe_user@ca.gov` or `fred.smith@hospital.org`
Cell Phone	Type your cell phone number, including area code *You must enter 10 digits*
Alpha Pager	Type the e-mail address of your alpha pager Enter the complete address; for example: `6498511022@pagerco.net`

In this field or list	Do this
Numeric Pager #	Type the phone number of your numeric pager *You must enter 10 digits*
Alternate Phone	Type a phone number other than that of your primary work, home, or cell phones, including area code *You must enter at least 10 digits*
Satellite Phone	Type the number of your satellite phone, including area code
Other Means of Contact	Provide information for any additional means people may use to contact you *This information can be an e-mail address, or a phone or fax number*

6   Enter the following Miscellaneous information:

In this field or list	Do this
Languages Spoken	Select one or more languages that you speak
CPR Certified	Select this check box if you are certified to perform cardio-pulmonary resuscitation (CPR)

7   Click **Save**.

The *User Profile Change Confirmation* screen appears.

8   Click **OK**.

The *My Profile* page appears.

– or –

If you are logging on for the first time, the *Set My Alerting Security Code* screen appears. Follow the steps in "Setting Your Alerting Security Code" on page 21 to set your alerting security code.

BTRS also sends you an e-mail to confirm the information you just entered.

Updating Your Profile Information

You can change your profile information at any time if your contact information changes, such as your office location, phone number, or e-mail address. In addition, if you do not make any changes to your profile, every 30 days BTRS will prompt you when you log on to verify your information and make any necessary updates.

▶ **To update your profile information**

1   On the BTRS navigation bar, click **My Profile**.

    The *My Profile* screen appears and displays your current profile information.

2   Under Actions, click **Change My Profile**.

    The *Change My Profile* screen appears.

3   Using the steps in "To create your profile" on page 16 as a guide, make any changes to your profile.

4   At the bottom of the screen, click **Save**.

    BTRS displays the message, "Profile successfully changed!"

5   Click **OK**.

    The *My Profile* page appears, and BTRS sends you an e-mail to confirm the changes you made.

Using Alerting Security Codes

The alerting security code is a four-digit number you enter to confirm an alert over the phone. When you receive an alert via a phone call at one of your designated phone numbers, you will be asked to enter this number to confirm your identity before the alert message will play.

Your alerting security code does not expire, but you can change the number at any time through the BTRS portal. You may also choose to have your BTRS administrator change your code for you.

Your alerting security code and your password (which you use to log into BTRS) have different values and are not used for the same purpose. For more information on passwords, see "Changing Your Password" on page 26.

Setting Your Alerting Security Code

As part of the profile confirmation process, the first time you log on to the BTRS portal, you will be prompted to create an alerting security code.

Set My Alerting Security Code screen

The *Set My Alerting Security Code* screen only appears when you log on for the first time, after you complete the steps in "Creating Your Profile" on page 16. To change an existing security alerting code, follow the steps in "Changing Your Alerting Security Code" on page 22.

▶ **To set your alerting security code**

1   On the *Set My Alerting Security Code* screen, in the **New Alerting Security Code** field, type the four-digit alerting security code you want to use.

2   In the **Verify New Alerting Security Code** field, reenter your alerting code.

3   Click **Save**.

    The *Alerting Security Code Change Confirmation* screen appears.

4   Click **OK**.

    The *Create an Alerting Profile* screen appears. Use the steps in "Creating Alerting Profiles" on page 23 to create your alerting profile.

Changing Your Alerting Security Code

You can change your alerting security code at any time to another four-digit number, either for security reasons, or if you've forgotten the number.

▶ **To change your alerting security code**

1   On the BTRS navigation bar, click **My Profile**.

The *My Profile* screen appears.

2   Under Actions, click **Change My Alerting Security Code**.

The *Change My Alerting Security Code* screen appears.

3   In the **New Alerting Security Code** field, type the new four-digit alerting security code you want to use.

4   In the **Verify New Alerting Security Code** field, reenter your alerting code.

5   Click **Save**.

BTRS displays the message, "Alerting Security Code successfully changed for [your name]!"

6   Click **OK**.

The *My Profile* screen displays, showing your current profile information.

Using Alerting Profiles

Depending on your organization's alerting procedures and regulations, your organization may need to contact you with an alert at various times, even if you're away from the office or at another location. After you set your alerting security code, you have the ability to create, edit, and activate several different alerting profiles to meet those needs.

About Alerting Profiles

Alerting profiles merely provide a way for you to tell BTRS how you want to be notified in case an alert is sent to you. BTRS allows you to create an automated list of contact methods, such as cell phone, e-mail, and pagers, for low, medium, and high profile alerts. In addition, you can specify which of those contact methods you want to use for each alert, based on the alert's priority (low, medium, or high), and the order in which the alert is sent to each device.

You can create several different profiles that enable you to specify different scenarios for contacting you. For example, when you are at work, you may want to be notified of an alert through your work e-mail address and work phone. When you go home, however, or if you are called away from your office, you may opt to be notified through other methods, such as your home phone, cell phone, or pager. In addition, if you travel or plan a vacation, and will not be able to respond to alerts, you

may want to create another profile that sends notifications to your work e-mail only, or does not notify you at all. By creating several alerting profiles, you need only to change your active alerting profile when your alerting situation changes.

Creating Alerting Profiles

The first time you log on to BTRS, you are prompted to create an alerting profile as part of the profile confirmation process. In addition, you can create additional profiles at any time. Creating an alerting profile enables your organization to alert you using the methods you designate.

You may opt to not create an alerting profile when you first log on to BTRS. If you do not create and activate any alerting profile, you will still receive an e-mail each time an alert is sent to your role.

▶ **To create an alerting profile**

1   On the BTRS navigation bar, click **My Profile**.

– or –

If you are logging on for the first time, after completing the steps in "To set your alerting security code" on page 21, skip to step 4.

The *My Profile* screen appears.

2   Under Actions, click **Change My Alerting Profiles**.

The *Change the Alerting Profiles* screen appears.

3   Click **New**.

The *Profile Name* screen appears.

If you are logging on for the first time, the *Create an Alerting Profile* screen appears after you complete the steps in "To set your alerting security code" on page 21.

4   In the **Profile Name** field, type the name you want to give your alerting profile.

Create a name that accurately reflects the purpose of the profile, such as "daily," "weekend," "on call," or "vacation."

5   To make this alerting profile active, select the **Activate** check box.

6   Under High Priority Alerts, in the **Location** lists, select one or more contact devices you would like BTRS to send alerts to when high priority alerts are sent to you.

When an alert is sent to you, the device you select in the **Location 1** list will be contacted first; the device in the **Location 2** list will be contacted second, etc.

If you create and activate an alerting profile in which you select **(none)** for all locations, you will *only* receive alerts on the BTRS portal.

7   Repeat step 6 for the Medium and Low Priority Alerts sections.

If you are logging on for the first time, you can now continue to the portal home page. Under Actions, click **Back to BTRS Home**.

8   Click **Save**.

The *Change My Alerting Profiles* screen appears and displays the profile you created.

Activating Alerting Profiles

You can choose to activate any of your alerting profiles at any time so you receive alerts through the proper contact devices. Each time your alerting situation changes, simply repeat these steps to change your active alerting profile.

BTRS administrators can also activate a different alerting profile for you. For more information, contact your BTRS administrator.

You can activate your alerting profile in one of two ways: when you are creating your alerting profile (see "Creating Alerting Profiles" on page 23), or by selecting an existing profile.

▸ **To activate an alerting profile**

1   On the BTRS navigation bar, click **My Profile**.

The *My Profile* screen appears.

2   Under Actions, click **Change My Alerting Profiles**.

The *Change My Alerting Profiles* screen appears.

3   Select the alerting profile that you would like to activate.

4   Click **Activate**.

The alerting profile is activated, and the *Change My Alerting Profiles* screen displays your selection as the active profile.

Editing Alerting Profiles

You have the option at any time to edit your alerting profiles by changing how you want to be contacted for one or more alerting priorities.

▶ **To edit an alerting profile**

1   On the BTRS navigation bar, click **My Profile**.

    The *My Profile* screen appears.

2   Under Actions, click **Change My Alerting Profiles**.

    The *Change My Alerting Profiles* screen appears.

3   Select the alerting profile that you would like to change.

4   Click **Edit**.

    The *Profile Name* screen appears, and displays the profile's current information.

5   Make any necessary changes to your alerting profile.

6   Click **Save**.

    BTRS saves your changes and displays the *Change My Alerting Profiles* screen.

Deleting Alerting Profiles

When you no longer need to use a particular alerting profile, you can delete it so that it no longer appears in the alerting profile list.

▶ **To delete an alerting profile**

1   On the BTRS navigation bar, click **My Profile**.

    The *My Profile* screen appears.

2   Under Actions, click **Change My Alerting Profiles**.

    The *Change My Alerting Profiles* screen appears.

3   Select the alerting profile that you would like to delete.

4   Click **Delete**.

    BTRS displays the message, "Are you sure you want to delete [name of alerting profile]?"

5   Click **OK.**

    The alerting profile is removed from the alerting profile list.

Changing Your Password

When your BTRS administrator creates your user account, he or she assigns a user name and password that you use to log into BTRS. Although your user name cannot be changed, you can change your password after you log on for the first time.

Before changing your password, be sure that you follow your organization's security guidelines or requirements for your password. Check with your BTRS administrator if you have any questions.

After you change your password successfully, BTRS requires you to log in using your new password.

Your password is not the same as your alerting security code, which is the four-digit number you use to identify yourself on the phone when you receive an alert. For more information on alerting security codes, see "Setting Your Alerting Security Code" on page 21.

▶ **To change your password**

1   On the BTRS navigation bar, click **My Profile**.

The *My Profile* screen appears.

2   Under Actions, click **Change My Password**.

The *Change My Password* screen appears.

3   In the **Current Password** field, type your existing password.

4   In the **New Password** field, type the new password you want to use.

5   In the **Verify New Password** field, reenter your new password.

6   Click **Save**.

BTRS displays the message, "Are you sure you want to change your password?"

7   Click **OK**.

BTRS displays the message, "Password successfully changed!"

8   Click **OK**.

The *Connect to [BTRS portal URL]* dialog box displays.

9   Using your new password, log on to the BTRS portal.

4 Using the Alerting System

The alerting feature in BTRS provides a powerful and efficient method to inform one or more roles and/or role groups in your HAN of important events in your area. Alert messages can be sent to users' e-mail addresses, phones, fax numbers, and alpha pagers.

Receiving and confirming alerts is simple and takes only a few moments to do. You can choose how you are alerted so that you don't miss out on any critical information.

Viewing Active Alerts

For more information about setting and modifying your alerting profile, see "Using Alerting Profiles" in Chapter 3, page 22.

When an alert is sent to the users in your role, you can be contacted in one of three methods:

- Through the devices you specify in your active alerting profile

- Through your work fax only

- Through your work e-mail only

In addition, the alert is always posted on the BTRS portal for the duration of the alert, even if you have already confirmed receipt of the alert.

Viewing Active Alerts on the BTRS Home Page

The BTRS home page displays all active alerts sent to your role by another user. All alerts remain on the BTRS home page for the duration of the alert, which is established by the user sending the alert, even if you have already confirmed the alert through any device (phone, e-mail, portal, etc.). In addition, you can view the alert's priority, the name of the user who sent the alert, and the subject of the alert.

By default, alerts appear in the order sent to you. To sort the alerts in ascending order by sender or subject, click the column once. To sort the results in descending order, click the column again. An arrow appears next to the column's title to indicate the order in which the alerts are sorted.

▼ Alert Time	Sent From	Subject	Priority
8/24/2004 1:43:23 PM	Chris Edwards	Investigation Results	Medium

Active alert on the BTRS home page

Viewing Active Alert Details

From the BTRS home page, you can view additional information about an alert by clicking the date and time link in the **Alert Time** column. Doing so displays the *Alert Details* page.

The *Alert Details* page displays detailed information about the alert, including the time the alert was sent, the time the alert will expire, the name of the alert sender, the text of the alert message, the alert's status, and the roles and/or role groups notified.

▸ **To view the details of an alert you received**

1   On the BTRS home page, in the **Alert Time** column, click the date and time link of the alert for which you want to view details.

The *Alert Details* screen appears.

2   Perform one or more of the following functions:

Click this	To do this
Back to previous view	Return to *View My Sent Alerts* screen
Refresh Alert Details	Update the status of alert currently being sent to users
Confirm Receipt of Alert	Confirm that you have received the alert
View Roles Notified	Display the list of each role and/or role group you sent the alert to

Confirming Receipt of Alerts

For more information about creating and activating alerting profiles, "Using Alerting Profiles" in Chapter 3, page 22.

You can confirm alerts sent to you through one of several methods: email, telephone, or the BTRS portal, depending on which devices you include in your active alerting profile. Notifications are sent to each device based on the order you select in your alerting profile, or in the case of a Work Fax or Work Email Only alert, only to your designated fax number or e-mail address. After you confirm receipt of the alert, any other scheduled notifications are discontinued.

In addition, the alert sender can view the progress of the alert, including both the details of which devices your alert was sent to, as well as the time and method of your confirmation.

To verify that you have confirmed receipt of an alert, click the alert link either on the BTRS home page or on the *Alerts* screen to display the *Alert Details* screen. If the **Confirm Receipt of This Alert** link displays at the top of the screen, you have not yet confirmed the alert.

Confirming Alerts through the BTRS Portal

You can choose to confirm an alert through the BTRS portal in one of two ways – either on the BTRS home page, or from the *Alerts* screen.

▶ **To confirm receipt of an alert on the BTRS home page**

1   On the BTRS home page, click the alert you want to confirm.

The *Alert Details* screen appears.

Alert Details

↗ Back to Previous View   ✓ Confirm Receipt of Alert

Investigation Results
Medium

Time Sent: 8/24/2004 1:43:23 PM
Expires: 8/24/2004 2:43:23 PM
From: Chris Edwards
Message: Investigation results for the 4/27 ecoli case are available
                for review in the Ecoli Workgroup folder.
Status: Pending

Roles Activated: ⊞ **View Roles Notified**
                 (1 roles)

2   At the top of the screen, click **Confirm Receipt of Alert**.

The alert is confirmed, and the Confirm Receipt of Alert link no longer appears on the screen.

▶ **To confirm receipt of an alert on the Alert Details screen**

1   On the BTRS navigation bar, click **Alerts**.

The *Alerts* screen appears.

2   Under Active Alerts, in the **Alert Time** column, click the date and time link of the alert you want to confirm.

The *Alert Details* screen appears.

3   At the top of the screen, click **Confirm Receipt of Alert**.

The alert is confirmed, and the Confirm Receipt of Alert link no longer appears on the screen.

Confirming Alerts via Telephone

If you elect to have an alert sent to any standard telephone or cellular phone, you can confirm receipt of the alert through your phone without logging in to BTRS.

If a Work Fax or Work Email Only alert is sent to you, you will not receive telephone calls, even if you have entered phone numbers in your alerting profile.

▶ **To confirm an alert via the phone**

1   Upon answering your phone, listen to the automated greeting.

2   Press any key on your phone to continue.

For more information about setting and changing your alerting security code, see "Using Alerting Security Codes" in Chapter 3, page 20.

3   When prompted, enter the four-digit security code you created as your alerting security code.

4   After successfully entering your code, listen to the alert message.

– or –

If you are unable to enter your code, or if you enter an incorrect code, the prompt repeats.

After three unsuccessful entries, BTRS disconnects. You must then confirm the alert using another method.

5   When you have listened to the entire alert message, press **1** on your phone to confirm the alert, or **2** to repeat the message.

Confirming Alerts via E-mail

If you elect to have an alert sent to your e-mail address, you can confirm the alert via the e-mail message.

If a Work Fax Only alert is sent to you, you will not receive an e-mail, even if you have entered e-mail addresses in your alerting profile.

▶ **To confirm an alert via e-mail**

1   Upon opening the e-mail message, review the alert message in the e-mail.

The e-mail displays the subject and message of the alert. To view the name of the alert sender, you need to review the information on the BTRS home page or on the *Alerts* screen.
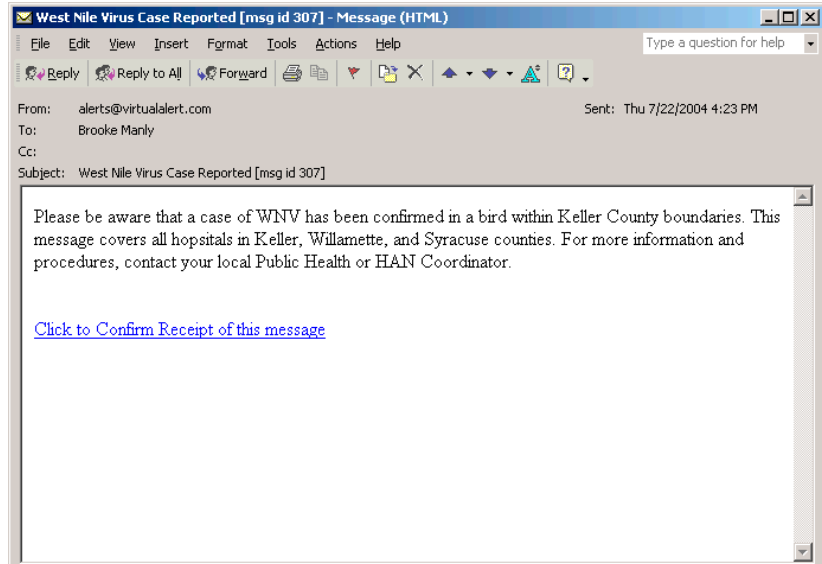
2   At the end of the alert message, click the **Click to Confirm Receipt of this message** link.

3   If you are not currently logged in to your BTRS portal, you are prompted to log in to BTRS.

    After you successfully log on, BTRS displays the message, "Alert confirmed as received."

5 Using My Directory

The Directory section of the BTRS portal enables you to view, search for, and export other BTRS users' contact information. Because each BTRS user must update the information in his or her profile at least every 30 days, you can rely on the fact that the contact data in the directory is up-to-date. You can use this information to e-mail or fax items that BTRS does not, or to update your organization's contact database in other applications, such as Microsoft® Excel and Outlook®.

Depending on which data other users enter about themselves, you may be able to view the following information about each user:

- Name
- Title
- Organization name
- Type of industry user works in
- What languages the user speaks
- Roles the user is assigned to
- Contact information:
    - E-mail address
    - Work phone number
    - Fax number

All other information in that user's profile appears as **(private)**.

In addition to viewing user information through the directory tree view, you can also search for individual users' contact information, and copy directory information into other applications.

Using the Directory Tree View

For more information about what roles and OUs are, see "Roles, Role Groups, and Organizational Units" in Chapter 2, page 10.

The directory tree organizes user information by each role and Organizational Unit (OU) created in your BTRS portal. The name of each OU appears in bold, with an icon ( ) to the left. All roles appear in the tree as links; clicking the link displays each user in that role and the associated contact information.

▶ **To view users in the Directory Tree**

1   On the BTRS navigation bar, click **Directory**.

The *My Directory* screen appears.

2   In the left pane, on the Directory Tree tab, expand the tree to locate the role for which you want to view user information.

You can search for users. For more information, see "Searching for Users in the Directory" on page 36.

3   Click the link for any role to display contact information in the right pane.

Searching for Users in the Directory

In addition to viewing users in the directory tree by role, you can search for individual users using other criteria, including the user's name, the company he or she works for, or the city in which he or she works. For example, you can perform a search to look for all users who work in Los Angeles, or whose title is HAN Coordinator.

Search results only display information entered by other users that you have permission to view.

▶ **To search for users in the directory**

1   On the BTRS navigation bar, click **Directory**.

The *My Directory* screen appears.
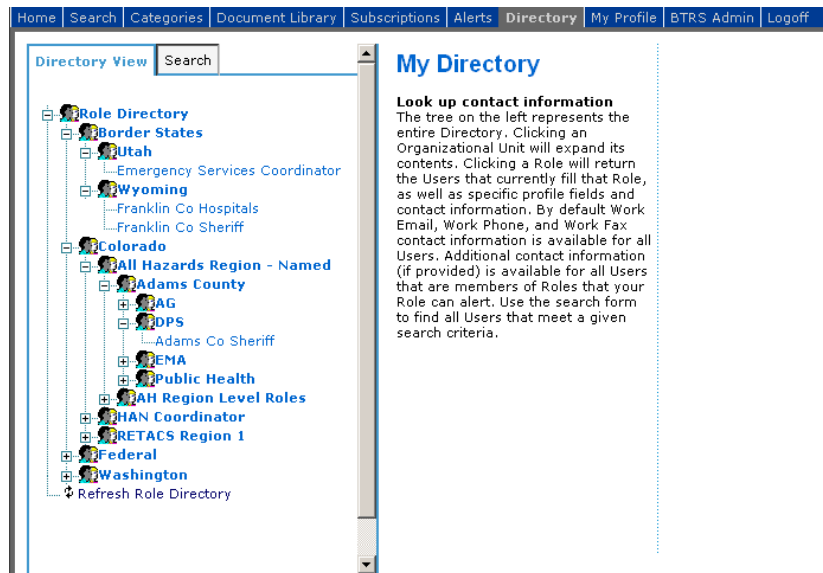
2   In the left pane, click the **Search** tab.

3   In the **Field** list, select one of the following:

Select this option	To search by
Name	The user's name
Title	The user's job title
Organization	The name of the organization the user works for
Business Category	The category of business the user selected in his or her profile
Prof. License	A professional license the user holds
Specialty	The specialty the user selected in his or her profile
Spoken Languages	A language the user speaks

Select this option	To search by
Work Location	The user's job location
Work City	The city in which the user works

4   Based on the selection you made in step 3, in the **Criteria** list, select one of the following:

Select this option	To search for
Contains	Words that contain the letter, word, or phrase you enter in the **Text** field
Equals	Words that appear exactly as you enter in the **Text** field
Begins with	Words that begin with the letter or letters you enter in the **Text** field
Ends with	Words that end with the letter or letters you enter in the **Text** field

5   Based on the selection you made in step 3, in the **Text** field, type the letter, letters, word, or phrase you want BTRS to search for in the directory.

To view more of the right pane, place your cursor on the scroll bar between the left and right panes, then click and drag the scroll bar to the left.

6   Click **search**.

The results of your search display in the right pane.

Exporting Directory Information

After performing a search or locating users within a role, you can quickly create a Microsoft® Excel spreadsheet or a table in Microsoft® Word that contains all user information displayed on the screen.

▸ **To copy user information to a spreadsheet**

1   On the *Directory* screen, select all the text you want to insert into the spreadsheet.

    You can quickly select all text on the screen by pressing **CTRL ✛ A**.

2   Right-click the selected text, and click **Copy** (or press **CTRL ✛ C**).

3   Open a new or existing document in Microsoft® Excel or Word.

4   Place your cursor at the location in the spreadsheet or document where you want to insert user information.

5   On the **Edit** menu, click **Paste** (or press **CTRL ✛ V**).

    The text from the *Directory* screen appears in the document or spreadsheet.

Glossary

A

active alerts Alerts that have been sent and have not yet expired based on set.

alert A notification sent to inform or warn roles within the BTRS directory.

alert details All details of a sent alert, including the alert's sender, subject, message, priority, send time, expiration, and roles notified.

alertable roles A role designated by a BTRS Administrator to receive alerts from a particular role or role group.

application One or more programs in applications software that you can run on your computer. Some examples of applications are database programs (Microsoft® Access), word processors (Microsoft® Word), and spreadsheets (Microsoft® Excel).

B

Back button In Microsoft® Internet Explorer, a button on the Standard Buttons toolbar that enables you to return to the page you were previously viewing. Not all pages enable you to use the Back button.

browser A software application used to locate and display Web pages. To use BTRS, you need to use Microsoft® Internet Explorer's browser. Most browsers can display both text and graphics, as well as sound and video.

BTRS Admin A BTRS user with broader permissions to manage portal content and settings, as well as roles, role groups, and users. In addition, BTRS Admins can generate and view various administrative reports and logs.

D

dashboard A page on a dashboard site. Each dashboard contains a collection of Web parts in a modular view that can be presented to users in a Web browser. See also **dashboard site**, **Web part**.

dashboard site A Web site created by using digital dashboard technology. The dashboard site contains a number of pages, or dashboards. The dashboard site is used to distribute information to workspace users through a Web browser. See also **digital dashboard**, **Web Part**.

digital dashboard See **dashboard**.

directory The collection of Organizational Units (OUs) and the roles within those OUs, displayed in a tree format. See also **tree**.

F

form See **screen**.

M

maximize When using a window, to enlarge the size of the window (usually so that it covers the entire screen). See also **minimize**.

minimize When using a window, to reduce the size of and replace the window with an icon on your task bar. Minimizing retains the information displayed in the window while allowing you to view other windows. Clicking the icon on the task bar restores the window to its previous size and position. See also **maximize**.

My Profile Information contained in BTRS about an individual user that includes work, home, and alternate contact information. The information can be updated at any time by that user, or by a BTRS administrator.

N

navigation bar A series of links on each page in BTRS that enable you to view another section of BTRS, such as My Profile, Directory, and Alerts.

O

Organizational Unit (OU) A container that holds objects. Typically, an organization creates OUs that resemble the organizational structure, maintaining an OU for each department or region.

P

page A document on the World Wide Web that displays all the content assigned to that page, such as the BTRS home page or Alerts page. See also **screen**.

permission Levels of authorization within the portal that determine access to documents/ sections in the workspace.

profile (portal) Information about individual users and documents that are uploaded into BTRS. See also **My Profile**.

R

roles A title within an Organizational Unit (OU) that reflects one or more users. In BTRS, roles play an important part of security and accessto areas of the portal.

role group One or more roles grouped together for the purposes of assigning alertable roles, folder permissions, or management rights. See also **alertable roles**, **roles**.

S

screen In BTRS, a Web page that serves to perform a particular function, such as sending an alert, entering document profiles, or generating a report. See also **page**.

T

tree A method of organizing Organizational Units (OUs), roles, role groups, and/or users in which the groups appear similar to that of the branches of a tree. Clicking the items in the tree expands or collapses the information stored with that branch.

W

Web browser See **browser**.

Web page See **page**.

Web part A customizable, reusable component used to display specific information on a dashboard. Web parts are used to associate Web-based content (such as XML, HTML, and scripting) with a specific set of properties in an organizational framework. See also **dashboard site**, **digital dashboard**.

window An enclosed, rectangular area that displays on your monitor screen that runs a program or displays data. You can have several windows open at one time; most allow to you to resize, move, maximize, and minimize the window. See also minimize, maximize and application.

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